

Make your field managers more effective by empowering them to resolve issues on the spot rather than having to call or visit the office to check information

The Templa CMS, Mobile CMS module enables you to provide information and selective data entry functionality to your operations field staff if they are equipped with mobile tablet technology. Information available from Mobile CMS includes general site or contract data, budget and billing data, staff details with pay rates, holiday entitlement, holiday taken and right to work data such as visa expiry dates. Field management staff can also use their tablet to manage their work-bills and make new ad hoc work-bill requests, view outstanding PAT Test requirements and carry out quality audits using the CMS Quality Audit module.

Typical challenges faced by contractors

- "To check a cleaner's holiday entitlement or to see if Right To Work data or CRB checks have come through means the Area Manager calling payroll as they can't access that sort of data on site. This can be extremely frustrating"
- "Right now if a client gives the go-ahead to carry out some one-off cleaning, our Area Manager has to complete a special form and post it back to the office to raise the work-bill"
- "We'd like our Area Managers to carry out quality audits on their i-Pads, take any pictures of problem areas, resolve corrective action and get the client to sign it and then send it back to the office"
- "Area Managers currently have to phone stores orders through to the office which puts pressure on our admin teams"
- "It would be really useful if instead of having to visit the office to change part of a cleaning specification the Area Manager could just do it on his laptop and email the change back to the office"
- "At the moment, an induction form is signed on site and then gets sent back to the office to be filed, which for a regular routine task is a bit cumbersome"
- "Our Area Managers would look more professional at client meetings if they had more information at their fingertips like training records or PAT tests or periodic work that has been scheduled, like window cleaning for example"



Templa CMS Mobile CMS – features and benefits

Feature

The Templa CMS Gateway manages data synchronisation between the central CMS database and Mobile CMS for use on tablets. Updated data is pushed out to tablets when online and vice versa will pull back updated data

Mobile CMS allows field managers access to key contract data on their tablet such as client contact details, expenditure budgets, client billing amounts, stores orders and work bills (both historical and outstanding), information about cleaning staff assigned to the contract, and the contents of the Site Binder, for example cleaning specifications, risk assessments, method statements and training records

Mobile CMS also allows field managers to generate new ad-hoc work bills whilst on site. Once pulled back to the office CMS Workflow can pass the request to authorised users to review the notes, complete data entry and implement the work-bill request

With Mobile CMS field managers can complete the following CMS forms: Product Requirements, Stores Order Request, Equipment Requirements, Equipment Audit Request, Cleaning Specification, Risk Assessment, Method Statement, Staff Induction and Training Records

Benefit

Once an Area Manager completes a new form, such as an induction training record or a quality audit on their tablet, CMS then pulls back the information to the office for logging, action or analysis. No need for emails

The ability to view contract data on a tablet helps field managers to deal with issues more quickly and more effectively, reducing their reliance on calls to the office and impressing clients with their grasp of the contract. In particular, direct access to staff data such as start date, hours, pay rate, payroll details, accrued holiday entitlement, days taken and, if permitted, data such as visa expiry and CRB status, makes it far easier to resolve staff queries

Monitoring the completion of periodic and ad hoc work is a vital part of field managers' responsibility, now made easier with access to all relevant information through the tablet, which they can also use to sign off completed work and initiate new jobs

Instead of completing this documentation back at the office or at home, field management can do the work 'on the hoof' where they can see what they're dealing with



Templa CMS brings everything together in a centrally managed contract database and delivers excellent front-line functionality for our operations field staff.

Jacqueline Kingsnorth – Finance Director, Regent Cleaning

Why Mobile CMS?

The interactive functionality made possible by the internet link to the Templa CMS Gateway means staff can perform key operational and admin tasks without the need to complete paper forms and deliver them back to their office location. This speeds up activity and response times and delivers better customer service as a result.